



City of Clearlake

14050 Olympic Drive, Clearlake, California 95422
(707) 994-8201 Fax (707) 995-2653

Committee/Commission Member Application

Please return the completed application to the City Clerk at the above address

Please be advised that the information on this form is a public record subject to disclosure upon request under the California Public Records Act.

Name: Christopher W. Inglis

Telephone: (Home) _____ (Work) _____ (Cell) (650) 575-7383

Email: cwinglis@gmail.com

Street Address: 3896 Oak Dr.

Mailing Address: _____

Occupation: Financial Advisor

Employer: UBS Financial Inc.

Registered Voter? Yes No

Please provide a brief statement regarding what skills you would bring to the Committee if appointed:

- Deep financial knowledge, education, experience
- Involved in dozens of real estate/building transactions
- Experience in both ownership and development in land deals
- 30 years of Lake Co. life, including 20 years as a homeowner in the City of Clearlake

Please provide a brief summary of your education and work experience:

B.A. Economics from U.C. Davis (also political science)
Graduate work at the state Capitol w/ Ass'yman Robert Naylor
C.F.P. Designation, American College, Bryn Mawr, Pennsylvania
CEPA Designation (Certified Exit Planning Advisor)
40 years as a financial advisor, specializing in Municipal Financing
(last 15 years with UBS Financial (a Swiss bank))

Name of City Commissions/Committees
On Which You Have Served

No. of Years Position(s) Held

Menlo Park Friends of the Library

2

Member, book fair prep. work

West Bay Sanitary District

1

Employee Consultant w/ staff

Name of County Commissions/Committees
On Which You Have Served

No. of Years Position(s) Held

San Mateo Co Historical Assoc.

4

member, V-P

Can you attend daytime meetings (8:00 A.M. – 5:00 P.M.)

Yes No

Can you attend evening meetings (After 5:00 P.M.)

Yes No

A résumé reflecting experience, community activities, or other qualifications not listed above may be attached in order to assist the Council in evaluating your application (OPTIONAL).

For further information contact Melissa Swanson, City Clerk at 994-8201 Ext. 106 or mswanson@clearlake.ca.us.

I HEREBY CERTIFY UNDER PENALTY OF DISQUALIFICATION AND TERMINATION THAT THE FOREGOING INFORMATION IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.

Signature: 

Date: 2/6/2023

FOR OFFICE USE ONLY

Received

RECEIVED

By:

Melissa Swanson

FEB 07 2023

CITY OF CLEARLAKE

Christopher W. Inglis

(Applicant to City of Clearlake Planning Commission)

3896 Oak Drive
Clearlake Ca 95422
cwinglis@gmail.com
650.575.7383

I am a CFP®, a CEPA, and licensed Life, Annuities, Health, LTHC agent in California, and several other states. I have passed and/or hold FINRA series 3, 7, 9, 10, 24, 31, 63, 65, SIE.

Work Experience

Vice President – Wealth Management
UBS Financial Services - San Mateo, CA
November 2007 to Present
Multi-million dollar team leader
Mentor to trainees and new CFPs
Muni finance, fixed-income and annuity expertise

Vice President, Branch Manager
AG Edwards and Co. Inc. - Redwood Shores, CA
November 2001 to November 2007
AGE was bought by Wachovia so we moved to UBS.
Branch Manager
Chairman's Club, President's Club
Team Leader for multi-million dollar team

Education

American College at Bryn Mawr
Certified Financial Planning
September 2000 to June 2001

California Teaching Credential Program in Education
San Francisco State University - San Francisco, CA
September 1990 to June 1991

Bachelor's in Economics, Political Science
UC Davis - Davis, CA
September 1976 to December 1980